

FY 2004 Beta Review Guidance for All Participants

1. Purpose

Every project which undergoes Beta testing will also undergo Beta review. Beta reviews are usually held at the program office in Arlington, Virginia.

The Beta Review is the **formal** venue at which the Beta test results and CTA/Portfolio Leader's evaluation are presented to the SAS PM. The SAS PM chairs the review, aided by the CTA/Portfolio Leader. The review provides the SAS PM with a current overview of the project as well as the results of the Beta-level test event(s) and CTA/Portfolio Leader's evaluation. It gives the SAS PM an opportunity to meet with the CTA/Portfolio Leader, the Project Principal Investigator and the Beta tester(s) to thoroughly understand the code's performance strengths and weaknesses and to resolve any questions concerning the conduct of the test event.

2. Preparation

Well in advance of the review, the CTA/Portfolio Leader should review his/her materials as well as the Project Principal Investigator's and Beta tester(s)' presentation materials and reports and should ensure that they are completed and **revised as necessary in accordance with SAS PM's guidance**. (Materials which are revised should be clearly marked as such.) The CTA/Portfolio Leader will also ensure that the following read-ahead information and documents (in the media specified below) are complete and are received by the SAS PM or his/her staff **three weeks** before the review. All items must be provided in MS Office-compatible media as shown in the far right column of the table which follows.

Please note that hard copy originals **of both formal reports** should already have been signed and transmitted by mail and the Beta tester(s') full complement of attachments to the test report should have been received by the SAS PM.

Items	Originator	Hard Copy	MS Office- Compatible Electronic Media
Evaluation Report	CTA/Portfolio Leader	x (signed)	MS Word, RTF or PDF
Beta Test Plan (Approved version used for the test event)	Project Principal Investigator		MS Word, RTF or PDF
Beta Test Report(s) with attachments	Beta tester(s)	x (signed)	MS Word, RTF or PDF
Test performance data matrix	Beta tester(s)		MS Excel
Test results	Beta tester(s)		MS Excel, RTF or PDF
User comments and critiques	Beta tester(s)		
Presentation materials (viewgraph content and format below)	Beta tester(s)		MS PowerPoint
Presentation materials (viewgraph content and format below)	CTA/Portfolio Leader and Project Principal Investigator		MS PowerPoint
User comments and critiques (if available)	CTA/Portfolio Leader and Project Principal Investigator	x	MS Word, RTF or PDF
User and installation manuals and other pertinent <i>technical</i> documentation extant	Project Principal Investigator		MS Word, RTF or PDF
Examples of representative code front-end(s), input and output, validation scripts, etc.	Project Principal Investigator	x	RTF or PDF
Other project <i>management</i> plans (if applicable)	Project Principal Investigator	x	Word, RTF or PDF

3. Attire

Business attire is expected for this review.

4. Beta Review Presentation Format and Order of Events

The project team will provide a Beta review presentation to the SAS PM. This oral briefing and accompanying viewgraphs will consist of the subject areas and sequence shown in the table below. Time limits shown are approximations. The project overview should take no longer than 30 minutes; based on past experience, any overview that lasts more than 30 minutes dwells on technical details at the expense of exploring the project's impact.

Presentation Category	Time Limit	Information to be Presented	Presenter
Introductions	10 minutes	Not applicable	CTA/Portfolio Leader and SAS PM
Project Overview	30 minutes	<ul style="list-style-type: none">- Provide the project technical goals.- Provide the project successes and current or expected impact on DoD's mission.- Identify all users of the Beta version of the CHSSI software (include organization, phone number, email address on viewgraphs).	Project Principal Investigator
Test Results	30 minutes	<ul style="list-style-type: none">- Present any deviations from the test plan- Present test results for all targeted platforms, each CTP and remaining test report items.- Discuss the MS Excel matrix of test results.- Discuss any pertinent test issues.	Beta Tester(s)
Programmatic and Other Issues	30 minutes	<ul style="list-style-type: none">- Identify any technical and managerial impediments to the project.- Describe how PET has impacted the project.- Address plans to sustain software after CHSSI.- Discuss intellectual property rights issues with respect to software.- Discuss security and export control issues with respect to software.- Describe the software release policy.- Present the project's user interface(s) (e.g., newsletters, web page, and the like)- Identify any lessons learned.	Project Principal Investigator
CTA/Portfolio Leader Evaluation and Summary	10 minutes	<ul style="list-style-type: none">- Provide a summary of the evaluation report and a summary of the state of the project and any outstanding actions.- Identify any lessons learned.	CTA/Portfolio Leader

5. Discussion of Review Findings

The SAS PM and the CTA/Portfolio Leader will caucus to discuss the findings of the review. The Project Principal Investigator and the Beta tester(s) may be requested to provide further details during these discussions.

6. SAS PM Feedback

Typically, oral feedback will be provided after the caucus and formal written feedback will be sent at a later date. The SAS PM will provide a written document summarizing the Beta review results, detailing any recommended corrective action(s), and will provide a decision on authority to release the software to a wider community. This document will also address and validate the project's PMIs. The decision for continued HPCMP funding will be addressed. This feedback will be sent to the CTA/Portfolio Leader who will be responsible for communicating results of the test to the Project Principal Investigator. The Project Principal Investigator will implement any corrective action and report on the corrective actions required and progress of implementing the corrective actions in the project's quarterly report.

Results of the Beta review will be noted in past performance evaluations for new proposals.